

## POSITION DESCRIPTION

Position descriptions are the foundation for recruiting, classification decisions and performance evaluations. A position description is maintained in Human Resource Management for all staff and management employees describing current job duties and responsibilities. Position descriptions should be updated as needed to reflect current duties and submitted to Human Resource Management for review. New employees should review and discuss their position description with their Appropriate Administrator.

**Action Requested:** *Organizational Chart required for all actions.*

- Review of a new or vacant position
- Initiate a classification review
- Update an existing position description (no review requested)

<b>Name of incumbent (if filled position):</b>		
<i>If vacant, name of previous incumbent:</i>		
<b>Working Title:</b> Lead Financial Analyst - Student Financial Services		
<b>Classification Title:</b> Administrative Analyst / Specialist Exempt I		
<b>Department Name:</b> Student Financial Services		<b>Division:</b> Administration & Finance
<b>Appropriate Administrator/Supervisor Title:</b> Mardel Baldwin, Manager, Student Financial Services		
<b>Position Number:</b> 00000913	<b>Job Code:</b> 1038	<b>Grade Level:</b> 2
<b>Time Base:</b> 1.0	<b>FLSA Status:</b> Exempt	

**Position Summary:** *In a few sentences, briefly describe the primary function of the position.*

Under general supervision of the Manager of Student Financial Services, the Lead Financial Analyst is responsible for providing support and assistance to Student Financials staff, working closely with end-users and internal customers to ensure the integrity of the application data stored in the system; prepares business guides, training documents, and delivers end-user training; provides technical/functional support to the student financial component of CSUDH PeopleSoft Student Administration, and provides collections and accounts receivable support. This incumbent is also responsible for operational and policy research, analysis, reporting, and evaluation related to Student Financials; recommending improvements to the day-to-day operations of the automated systems; assuring proper recording and processing of daily and monthly jobs; and gathering technical/functional system and reporting requirements for the Student Financials applications (PeopleSoft and any related third-party products), including internal and external customers. Furthermore, duties include working with the Information Technology group on system improvements and upgrades, system testing, conversions, and implementations.

**Major Duties:**

*Describe the major responsibilities assigned to this position (typically 5 to 7) listing them in order of importance. Indicate the approximate percentage of time spent in each area of responsibility, estimated over a year timeframe (Minimum of 5% for a given duty. Primary responsibilities should represent the majority of the time allocation, with the total equaling 100%). Miscellaneous or other duties should be 5%.*

*Indicate duties, which are “essential functions” by checking the Essential Function box in the right column.*

*The Americans with Disabilities Act (ADA) provides that there shall not be a barrier to employment for an otherwise qualified disabled individual who is able to perform the “essential functions”, which is intrinsic to the work. **A function may be essential because 1) the position was established to perform the function; 2) a limited number of employees are available to perform the function; and/or 3) removing the function would fundamentally change the position.** (Example: A receptionist must be able to respond to in-person, telephone and electronic inquiries).*

Description of Duties	% of Time Total = 100	Essential Function
Prepares, analyzes, and interprets financial reports for all student account receivables to minimize ongoing receivables.	75%	<input checked="" type="checkbox"/>

<p>Reviews placement and removal of financial hold service indicators to monitor effectiveness. Coordinates service functions between other service units, including Financial Aid, Outreach &amp; Recruitment, and Admissions and Records.</p> <p>Assist with long-term collection of debt efforts via collection agencies, Franchise Tax Board (FTB), and assists with the write-off of student accounts;</p> <p>Follow-up and review of collection efforts of PERKINS loan activities.</p> <p>Prepares financial analyses and reports, which may include FTB and collection agency submissions. Develops, reviews, and documents accounting procedures.</p> <p>Research and resolves non-recurring problems related to student accounting and prepares internal financial reports and analyses as needed using data from a variety of sources.</p> <p>Reviews Federal, State, CSU, and University regulations and policies that affect the operations of billing/collections offices and monitors compliance therewith.</p> <p>Recommends and ensures implementation of changes in procedures where necessary.</p> <p>Provide technical/functional support to the student financial component of CSUDH PeopleSoft Student Administration.</p> <p>Work closely with end-users and internal customers to ensure the integrity of the application and data stored in the system;</p> <p>Work with the Information Technology group on system improvements and upgrades, system testing, conversions, and implementations.</p> <p>Define and evaluate Student Financial process based on business requirements and map against PeopleSoft Student Administration (SA) functionality.</p> <p>Prepares business guides, training documents, and delivers end-user training.</p> <p>Responsible for gathering technical/functional system and reporting requirements for the Student Financials applications (PeopleSoft and any related third-party products), including internal and external customers.</p> <p>Recommend and document solutions to requirement gaps and PeopleSoft Student Financials standard functionality.</p> <p>Document functional specifications for conversions, upgrades, interfaces, reports, forms, and workflow. Coordinate the wash-out process, participate in implementing, testing, and validating data from the Student Financial application and other third-party products including, but not limited to, TouchNet applications.</p> <p>Under established campus security policies, maintain TouchNet application user roles, create payment plans in the TouchNet Bill+Pay application, and create new stores in the TouchNet Marketplace application.</p> <p>Provide ongoing maintenance of all TouchNet applications in conjunction with TouchNet service personnel and the Student Financial Services department manager.</p>		
<p>Provide lead work direction to administrative staff and assist with training and development.</p> <p>Provide technical/functional support and assistance to Student Financials staff in the development of system automation and workflow analysis and assist in streamlining Student Financial activities;</p> <p>Create reporting tools (queries and reports) to support cashiering, student refunds, collection, and accounts receivable reconciliation.</p> <p>Assist in ensuring that Student Financials practices conform to all federal, state, and CSU rules and regulations. Examples of affected business practices would include 1098T, Franchise Tax Board, write-offs, credit card payments, and refunds.</p> <p>Responsible operational and policy research, analysis, reporting, and evaluation related to Student Financials;</p> <p>Recommends improvements to the day-to-day operations of the automated systems; and assures the proper recording and processing of the daily and monthly jobs.</p> <p>Contribution to the completion of broader and more complex organizational or program projects</p> <p>Acts as a representative to outside entities as needed</p>	20%	<input type="checkbox"/>
<p>Other responsibilities and duties as assigned by the Manager, Student Financial Services.</p>	5%	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

**Changes in position:** *If this is an existing position that you believe has changed, what specific duties or responsibilities have been changed, added to, or removed since the position was reviewed previously or since the incumbent was assigned?*

**Physical Effort:** *Indicate the type of physical effort which is essential to the position activities:*

Light Work - involves mainly sitting with up to 25% of the activities involving regular standing or walking; involves lifting of medium weight objects limited to 25 pounds.

**Environmental Factors:** *Indicate the type(s) of environmental factors which are essential to the position activities:*

<input checked="" type="checkbox"/> Inside (Typically Office Environment) Frequency: <b>Constantly - Essential</b>	<input type="checkbox"/> Extreme Temperature (hot/cold) Frequency: Choose an item.	<input type="checkbox"/> Elevated Work (Raised platform/scaffold) Frequency: Choose an item.
<input type="checkbox"/> Outdoor Frequency: Choose an item.	<input type="checkbox"/> Hazards Frequency: Choose an item.	

**Supervision Received:** *Indicate the level of supervision received by the position from the Appropriate Administrator.*

General Supervision - some control over administrative or technical aspects of work; definite work objectives are set, but the methods of performing tasks are frequently left to the judgment of the employee with the supervisor providing occasional advice.

**Supervision Exercised:** *Indicate the type of supervisory responsibilities that are associated with the position.*

Serves as a lead person for a small work group and/or students (non-manager).

**Specialized Materials:** *The position may require the use of the following equipment, machinery, tools, vehicles or office equipment:*

Personal computer, various software applications, including PeopleSoft, Excel, Word, Access, PowerPoint etc.

**Special Working Conditions:** *List any overtime requirements, 24/7 on-call, work schedule, etc.*

Extended hours may be required during peak periods.

**Knowledge, Skills, and Abilities:**

Knowledge:

Thorough knowledge of financial record-keeping, mathematical and general office methods, procedures, and practices.

Working Knowledge in investigating and analyzing problems with a broad administrative impact and implications.

Working knowledge of operational and fiscal analysis and techniques.

Experience working with current end-user reporting tools and demonstrated proficiency in Microsoft Office.

Working knowledge of and ability to apply standard theories, principles, practices, and techniques applicable to the program and/or administrative specialty to develop conclusions and make recommendations.

Abilities:

Ability to review financial documents for accuracy, completeness, validity, and adherence to standards; compute and post numbers rapidly and accurately; maintain files and records; identify, trace, and correct errors; follow directions; establish and maintain effective working relationships with others; exercise tact, courtesy, alertness, and good judgment in responding to others

Ability to apply accounting procedures and practices to the analysis of basic accounting problems;

analyze and interpret accounting data; apply problem-solving techniques in finding solutions to basic accounting problems; understand, interpret and apply applicable rules, regulations, policies, and procedures; query tools, integrated financial systems, and/or other types of records management systems, such as student accounting, cashiering and student financial aid;

Ability to use intermediate to advanced Excel functions (eg. VLOOKUP, concatenate, pivot tables).

Ability to translate functional needs and analyze data; ingenuity in determining methods to achieve programmatic goals and develop and implement program policies required.

Ability to take initiative and independently plan, organize, coordinate, and perform work in various situations where numerous and diverse demands are involved.

Demonstrated ability to effectively interpret, organize, and present information and ideas in written or presentation form.

Ability to train others on new skills and procedures and provide lead work direction.

Ability to articulate and communicate in a professional, clear, positive fashion with clients and staff.

Ability to read and write English at a level appropriate to the position.

**Skills**

Skill in the research, development, and evaluation of policies and programs, including skill in the collection, evaluation, and interpretation of data to develop sound conclusions and make appropriate recommendations.

Strong interpersonal skills with a self-starter attitude.

**Experience and Education:**

**Education:**

Bachelor's degree in a related field and/or equivalent training.

**Experience:**

At least three years of business analysis with experience involving study, analysis, and/or evaluation leading to the development or improvement of administrative policies, procedures, practices, or programs.

**Preferred Qualifications and/or Specialized Skills and Abilities:** (if none, write N/A):

**Preferred Experience:**

Equivalent to four years of progressively responsible experience serving as a business analyst; experience in providing outstanding customer service, performing complex activities associated with maintaining student accounts, and ensuring compliance with policy, procedures, and internal controls, and demonstrated leadership skills. Also, experience with reviewing collection efforts of PERKINS loans is preferred.

Experience using PeopleSoft Student Financials and TouchNet functionality in a university environment.

Functional experience in a Student Financials office at a university using a software package such as PeopleSoft handling: Accounts receivable; application of payment and other accounting issues; reconciliation of general ledger accounts; third party contracts, bad debt; Title V refunding; implementation of state and federal regulations; and maintenance of student financials set up tables.

**Signatures** (Acknowledgement that the information is accurate)

<b>Name of Employee:</b>	<b>Signature:</b>	<b>Date:</b>
<b>Name of Supervisor/Dept. Manager:</b> Mardel Baldwin	<b>Signature:</b>	<b>Date:</b>

**For HR Use Only**

Classified By: Tanisha Dean Date: July 29, 2024

- General Reporter   
 Limited Reporter   
 Background Check   
 Fingerprints   
 Physical Exam  
 Driver's License   
 Conflict of Interest   
 MPP Job Code \_\_\_\_\_